

PeopleSoft Transfer Checklist HR/Payroll/Benefits

October 18, 2005



This checklist highlights the Menu Items, Components, and Pages necessary for basic initial processing. The checklists focus on the most common general situations. For specific detail see relevant manual.

Transfer is used when an employee has been off the state payroll for less than one month.

HR/Payroll Checklist for Transfer of an Employee employed by another Agency

You will need to contact the agency that the employee was previously employed by. You will need to provide them with the transfer date and the position number that the employee will now be employed in.

TRANSFERRING AGENCY:

HR: (Navigation: Administer Workforce> Administer Workforce (GBL)> Use> Job Data)

Transfer (work location tab)

- Insert an effective dated row (Transfer date is 1st day in the new agency)
- Action of Transfer
- Reason of Inter-Agency Transfer
- Enter the position number (Given by receiving agency)

Save

A screenshot of the PeopleSoft Work Location tab form. The form is titled "Work Location" and has a tab bar at the top with "Work Location", "Job Information", "Job Labor", "Payroll", "Salary Plan", and "Compensation". The "Work Location" tab is selected. The form contains several fields: "Employee Status" (Active), "Effective Date" (09/19/2003), "Effective Sequence" (0), "Date Created" (09/19/2003), "Job Indicator" (Primary Job), "Action / Reason" (Hire), "Position Number" (with a search icon), "Position Entry Date" (with a search icon), "Regulatory Region" (USA), "Company" (with a search icon), "Business Unit" (11000), "Department" (with a search icon), "Location" (with a search icon), "Supervisor ID" (with a search icon), "Reports To" (with a search icon), "ID" (with a search icon), and "Establishment ID" (with a search icon). There are also buttons for "Override Position Data" and "Position Management Record". The bottom of the form has a navigation bar with "Personal Data", "Job Data", "Employment Data", "Earnings Distribution", and "Benefits Program Participation".

RECEIVING AGENCY:

HR: (Navigation: Administer Workforce> Administer Workforce (GBL)> Use> Job Data)

Transfer (work location tab)

- Insert an effective dated row
(Transfer date is 1st day in the new agency)
- Effective sequence of 1
- Action of Data Change
- Verify the information on
 - Work Location
 - Job Information
 - Payroll
 - Salary Plan
 - Compensation
 - Employment Data
 - Earnings Distribution

Work Location

Employee Status: Active

*Effective Date: 09/19/2003 Effective Sequence: 0

Action / Reason: Hire

Position Number: Position Entry Date: Current

Override Position Data

*Regulatory Region: USA United States

*Company:

*Business Unit: 11000 Office of Mgmt & Budget

*Department: Department Entry Date:

Location: Supervisor ID: Reports To: ID: Establishment ID:

Position Management Record

Personal Data Job Data Employment Data Earnings Distribution Benefits Program Participation

And make any changes necessary.

Once the job data pages are complete you will need to go to Personal Data.

(Navigation: Administer Workforce> Administer Workforce (GBL)> Use> Personal Data)

- Verify the information on
 - Name History
 - Address History
 - Personal History
 - Identity/Diversity
- And make any changes necessary.

Name History

Employee ID: NEW Employee

Name Type: Primary

*Effective Date: 09/01/2003

Format Using: USA United States

Refresh the Name Field

Person Name

Prefix: First: Middle: Last: Suffix: Name:

The other HR pages that should be verified are:

(Navigation: Administer Workforce> Administer Workforce (GBL)> Use)

- Workers Compensation
- Emergency Contact
- Driver's License Data (optional)

Payroll: (Navigation: Compensate Employees> Maintain Payroll Data (US)> Use)

All of these pages should be verified that they are correct for the employee's current position.

Direct Deposit (*The 'Suppress DDP Advice Print' box should be checked for all employees with self service access*)

Employee Tax Distribution (*This panel should be checked for correct locality information*)

Employee Tax Data

- Federal Tax Data
- State Tax Data

General Deduction Data (*All employees must be enrolled in S00901-Section 125 admin fee*)

Commitment Accounting: (Navigation: Home>Define Business Rules>Define Commit Accounting (US)>Setup>Department Budget Table)

Department Budget Table (All employees must have a department budget table. If the rehire is a permanent employee filling a previously existing position, the table may already be set up, but ensure the established account code(s) is correct for that employee.)

Benefits:

Navigation: Home>Compensate Employees>Administer Automated Benefits
(Refer to the training exercises found at the end of the Benefits Administration Manual for more detail)

1. **Verify BAS Activity.** (Navigation: Compensate Employees>Administer Automated Benefits>Use>BAS Activity).
2. **Assign Events to a Schedule.** (This is a centralized activity which NDPERS will run a minimum of three times per day.)
3. **Validate Schedule and Program Assignment.** (Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update.)
4. **Prepare Options.** (Compensate Employees>Administer Automated Benefits>Process>Run Control.)
5. **Verify Prepare Options.** (Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update.)
6. **Produce Enrollment Statement.** (Navigation: Compensate Employees>Administer Automated Benefits>Report>Enrollment Statement.) Make sure that Type = Web and Format = PDF.
7. **Elect Options.** (Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry.)
8. **Finalize/Enroll.** (Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control.)
9. **Verify Finalized Event.** Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update.) **Note:** *If there is an Election Error (EE) you will need to correct the error by going back to the Election Entry page. To determine what the error is, view Messages using the following navigation: (Compensate Employees>Administer Automated Benefits>Inquire>Messages.)*
10. **If correction is necessary,** you will need to rerun the Ben Admin process by going back to Process>Run Control, etc.
11. **Verify Base Benefits enrollment.** (Navigation: Compensate Employees>Administer Base Benefits>Use {Health Plans, Life and ADD, Leave Plans, etc.})